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ALBERTA GARDEN SUITE PILOT PROJECT

INTERIM ASSESSMENT

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for

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1.0 Introduction

1.1 Background

Alberta Municipal Affairs is exploring the prospect of allowing garden suites as one of the senior citizen housing options in Alberta. As part of that effort, the Department has implemented, in cooperation with the City of Lethbridge and the County of Parkland, a garden suite pilot project. The project involved the construction, placement and occupancy of two garden suites in Lethbridge and three in Parkland.

One of the main objectives of the pilot project is to evaluate and recommend on the appropriateness of the garden suite as a seniors' housing option. To that end, a preliminary assessment of the pilot project has been undertaken. The purpose of this study is to update that assessment. The findings and conclusions of the update are the subject of this report.

1.2 Objectives and Scope

The principal objective of this study is to undertake an interim assessment of the Alberta Garden Suite Pilot Project. Specifically, the assessment focuses on evaluating the following issues:

1. **value of care and services provided;**

2. **appropriateness of unit design;**

3. **appropriateness of siting criteria**

4. **appropriateness of unit construction and foundation techniques used;**

5. **appropriateness of servicing techniques used; and**

6. **appropriateness of the garden suite concept.**

The conclusions made in this study are compared to those made in the preliminary evaluation which are documented in the report entitled, "Preliminary Assessment of the Alberta Garden Suite Pilot Project". The preliminary assessment report is dated March, 1990.

1.3 Approach

The approach to undertaking the interim assessment is similar to that which was used for the preliminary assessment, thereby allowing for valid comparisons and conclusions. As was the case for the preliminary assessment, the interim assessment is based primarily upon the attitudes and positions of the key individuals directly involved in the pilot project including the garden suite occupants, host families and neighbours. These attitudes and positions once again have been assessed using appropriate measures and were obtained using a survey approach. The survey instruments used in the preliminary assessment were updated and administered to occupants and host families through personal interviews. Neighbours were interviewed by telephone. The updated survey instruments used for the interim assessment are contained in the Appendix.

1.4 Report Organization

Sections 2.0 through 7.0 provide an interim assessment of each of the six issues addressed by this study. The relevant findings of the initial assessment also are provided and comparative conclusions are made. These conclusions are then listed in Section 8.0.

2.0 Assessment of Care and Services Provided

2.1 Initial Assessment

All occupants reported that the quality of care and service provided by the host families either remained the same or improved since moving into the garden suite. Their care and service needs (emotional support and security, transportation, accompaniment to medical appointments and on shopping expeditions, and heavy cleaning assistance) were being met and their overall quality of life had improved significantly. The improvement was reported to be a direct consequence of the garden suite living arrangement in that placement of the unit in the backyard of the host families allows for the close proximity needed for the families to provide the care and service needs of the occupants without imposing unduly on their privacy and independence.

In all cases, the impact on the host families of providing the required care and service to the occupants in the garden suites was positive. Close relationships with the occupants were maintained and any stress resulting from distance, concern over the occupants' future, and their health, safety and emotional well being were eliminated. All host families reported an improvement in their quality of life which, again, was directly attributed to the garden suite arrangement and the independence and privacy it affords the families while enabling them to provide care and service needs with relative ease and convenience.

2.2 Interim Assessment

All occupants reported continuing satisfaction or extreme satisfaction with the garden suite living arrangement and the care and service they are receiving from their families as a result of this arrangement. Transportation and companionship through regular visits and interaction were the two most common services provided. Assistance with some household chores, shopping errands and accompaniment to medical appointments also were noted. In all cases, the provision of care and service requirements were shared by host family members. Security, proximity to family, independence and privacy were selected by all occupants as being the most valuable and desirable features of the living arrangement. No negative features were identified. All reported feeling either quite independent or very independent of their families. One occupant reported feeling even more independent than a year ago now that she has become more accustomed to the lifestyle. All remaining occupants reported no change in their degree of independence in the past year. In only one case has the degree of support required increased in the past year for health reasons. The health of the occupants in this case has deteriorated in the past year. In all remaining cases, no change in status of health, which was rated as satisfactory to good, was reported.

"Keeping an eye on things" and "helping out" were cited by most of the occupants as the services provided the host families. Child care and assistance with meals were noted in the case of two female occupants. In three of the five cases, the relationship with the host family was reported to be unchanged. In the remaining two cases, the relationship was reported to have improved over the past year. In all cases, the overall quality of life was said to have improved

over the past year and since moving into the units. Ill health and the host family potentially moving were the only two reasons given for moving. Four of the five cases reported feeling a part of their neighbourhood. The one occupant who did not feel a part of her neighbourhood shared this feeling with the host family and stated that, in spite of its urban character, neighbours do not mingle on a social basis. A similar observation also was made by one of the neighbours in the area. However, the occupant, host family and neighbour all felt comfortable with this aspect of their neighbourhood and consider the lack of social interaction to be a positive feature of the area.

The care and services provided the occupant, as stated by the host families, corresponds to the statements of the occupants. The same can be said of the services the occupants provide the families. The service and care responsibilities are shared by the family members in most cases. All families continue to be very pleased with the living arrangements and most reported a continuing improvement in lifestyle. Reduced stress related to health and safety of the occupants was seen as the greatest benefit of the arrangement along with increased privacy. The only concern expressed by one family is that "Dad tries to help too much and we worry that he doesn't overdo it". Relationships between host family members and the occupants was said to continue to remain close, if not closer. Interestingly, this also appears to apply to family members who live elsewhere and may result from an overall reduction in stress and conflict related to caring for the occupants within the larger family unit.

2.3 Concluding Remarks

The interim assessment of the care and services provided reflects the initial assessment according to most variables measured. Relationships remain close and family members appear to be more willing and better able to share care and service responsibilities. In the one case where more assistance is now required for reasons of failing health, the garden suite arrangement was considered a particularly optimal option. In all cases, the quality of care and service afforded by the garden suite concept continues to be rated as excellent.

3.0 Appropriateness of Unit Design

3.1 Initial Assessment

Occupants, host families, neighbours, industry and sponsoring agency representatives all expressed general satisfaction with the design and overall appearance of the units. Occupants were generally pleased with the interior design features, accessibility, liveability and comfort level of the units. A couple occupying one of the units expressed some concern with accessibility in the entrance/dining area. One of these occupants requires a walker and/or wheelchair. The exterior of the units met with unqualified approval of all occupants. Similarly, all host families were generally pleased with both the interior and exterior layout and appearance of the units although some minor suggestions were offered. Neighbours considered the appearance of the units to be pleasing and compatible with the respective neighbourhoods.

Neither the occupants nor the host families considered the cost of living in the garden suites to be excessive in light of the benefits of living in the units.

3.2 Interim Assessment

3.2.1 User Satisfaction

1. *General Unit Features*

Occupants were asked how they felt about the certain general features of the units including: size; general layout; furnishability; privacy; and, security. Occupants expressed a high degree of satisfaction with these general features. The only concerns were voiced by the couple occupying one of the Lethbridge units. Although this couple indicated that the size of the unit was "just right" for easy maintenance, the wheelchair occupant found the general layout to be a problem in the entrance/dining area. He has trouble maneuvering in this area and frequently hits the wall with his wheelchair. This is evident from the markings on the walls. Also, the couple stated that the unit was not quite large enough for all their furniture. These comments correspond to the comments made by the couple during the initial assessment surveys.

2. *Interior Design Features*

Occupants were asked if they were pleased with certain interior design features. Specifically, they were asked to comment on: general decor; wall finishes; floor finishes; number of entrances; location of windows; type of windows; number of windows; lighting; storage space; and, other features if applicable. Occupants are pleased with all the features listed excepting general decor, floor finishes and number of windows. Two of the occupants, one in Lethbridge and one in Parkland, indicated that they did not like the colour of the curtains but conceded that this was a matter of personal taste. The remaining Lethbridge occupant felt that the interior decor of the unit, including the curtains, was "gorgeous". Interestingly, these opinions on curtain colour were

not expressed at the time of the initial assessment, undertaken shortly after occupants moved into the units.

Three of the occupants expressed some concern with the floor finishes. One parkland occupant indicated that the floors were too hard and cold and that underlay should have been installed. The problem has been overcome through the use of runners and by wearing slippers. This same occupant expressed a similar concern during the initial assessment survey. A second Parkland occupant indicated that the floor finishes, particularly the carpeting, "was cheap and marked easily from the weight of the furniture". He further indicated that the "cheap carpet does not fit in with everything else which is first class". No such comments were made at the time of the initial assessment survey. A final observation offered by a Lethbridge occupant was that the linoleum is not wearing well. The nails and seams under the linoleum "can be seen and are coming through".

Finally, two occupants, one in each of Lethbridge and Parkland, expressed concern with the number of windows. Both felt an additional window in the bedroom, to afford an alternate view and/or a view of the host dwelling is required for reasons of security. Both these occupants "keep an eye on the " host family's property. This concern was not expressed during the initial assessment process.

3. *Unit Amenities*

Occupants were asked if the unit amenities, specifically the kitchen, the appliances and the bathroom, were easy to use. All occupants indicated these amenities were very convenient to use and, on the whole, are extremely satisfied. The only comments made refer to insufficient counter space, dryer lint filters being too high for the occupant to reach and a some minor problems with the oven. The comment related to counter space was made by an occupant who does extensive baking for family and friends.

4. *Unit Accessibility*

Occupants were asked to rate how accessible they found the unit (how easy it is to enter and move about the unit). Four of the five occupants rated the units as being very accessible. The couple occupying one of the Lethbridge units rated the unit as being quite accessible. This is consistent with comments made related to unit layout and results from maneuverability problems associated with the wheelchair. Initially, the couple had rated the unit as being not very accessible, suggesting that accessibility may be less of a problem now that they are accustomed to the unit.

5. *Overall Comfort*

Occupants were asked how comfortable their units are overall. Three of the five rated the units as being very comfortable and the remaining two rated them as being quite comfortable. The two "quite comfortable" ratings correspond to initial assessments made and includes the rating made by the Lethbridge couple who are experiencing some maneuverability problems associated

with the wheelchair. One of the Parkland occupants "upgraded his initial rating of quite comfortable, to very comfortable.

6. *Exterior Appearance and Design Features*

All occupants continue to be pleased with the exterior appearance of the units. Two of the occupants were particularly pleased with the porch and the planters and consider these to be "nice features". However, some concerns also were expressed. One of the Parkland occupants stated that when the planters were initially installed, he could not open the dining room window. This has since been rectified. The same occupant also stated that the planters are too deep and require too much soil to fill. Finally, he indicated, as he did during the initial assessment survey, that the porch is too small and should extend past the bedroom window. One of the Lethbridge occupants was not pleased with the appearance of the porch which already needs repainting. Wood slivers from the railing is a problem and the stairs are very slippery when wet. The Lethbridge couple with the wheelchair ramp made the same comment regarding the slippery surface of the ramp. In both cases, the occupants suggested some form of "indoor/outdoor" carpeting may be appropriate.

Occupants were asked for the first time if the walkway was to their liking. This question was not relevant in the initial assessment since walkways had not been installed at that time. Two occupants, one in Lethbridge and one in Parkland, replied that the walkways were not to their liking. The Lethbridge occupant found the concrete blocks to be very slippery when wet and the Parkland occupant said they were not level and even. In the latter case, the blocks have shifted and the occupant and family members have "tripped" a number of times.

The only other comments made with respect to the exterior of the units is that the back of the unit is very spartan and could be "spruced up", and that the skirting is "shabby looking". The comment related to the back of the unit was made by a Parkland occupant and is consistent with his earlier opinion expressed at the time of the initial assessment. The comment related to skirting was made by a Lethbridge occupant. Both occupants felt these "flaws" made the units look like trailers.

7. *One Year Later*

Occupants were asked how they would rate the units after having lived in them for about a year. All occupants rated the units highly and are generally very pleased with them.

3.2.2 Host Family Satisfaction

1. *Exterior Appearance*

All host family respondents remain quite pleased with the exterior appearance of the units. Two of the Parkland families remarked on the back wall of the units which was considered to look stark and unattractive and make it "look like a trailer". These same families made an identical comment at the time of the initial assessment survey. Also, the same remedial measure, the

addition of window shutters, was suggested. Another suggestion was that the overhangs be lengthened. The remaining Parkland family felt the appearance of the unit to be quite austere but acceptable. One of the Lethbridge families suggested that the quality of workmanship on the skirting could be improved and that a different foundation which would eliminate the need for skirting be considered. This family felt that the skirting, more so than any other feature, made the unit look like a trailer.

2. *Interior Design and Layout*

Four of the five families interviewed continue to be pleased with the interior design and layout of the unit. One of the Parkland families said they are very pleased. This same family also suggested, as they did a year ago, that the window levers may be difficult for older persons to operate and that the bathtub is too high to step into. These features, however, were not of concern to the occupant. The only other suggestion made regarding the interior of the unit related to the size of the living room which was considered too small. Again , however, neither of the two occupants affected, one in Lethbridge and one in Parkland, considered this a problem.

3. *Rent*

Host families were asked whether or not they felt the rent was reasonable. Two of the Parkland families felt it was reasonable in light of "what you get" whereas the remaining three families felt it was too high. When asked what would be a reasonable rent, two families suggested that the same 25 percent of income formula which applies to subsidized housing projects should apply. In other words, these families felt the garden suite units should be a subsidized seniors' housing option. One family suggested that $300 per month would be reasonable. This family subsidizes the two occupants who had to pay a total of $200 in utility charges for the month of January in addition to the $400 rental payment. Utility charges are not as high during the warmer months but total costs of living in the garden suite are still too high for the occupants relative to their income. In spite of these comments, all families stated that they would continue to pay the current rent figure because of the benefits resulting from the garden suite living arrangement.

4. *One Year Later*

Host families were asked how they generally felt about the units now that they have been in place for about one year. All responded by stating that they felt good about the units. Most were particularly pleased with the interior design and layout and less enthused with the exterior, which still looks like a trailer, although a "nice one". Given the parameters of the garden suite concept, however, and the temporary aspect of the concept, most felt the trailer approach was the only reasonable alternative.

3.2.3 Neighbour Satisfaction

Neighbours surveyed continue to feel that the appearance of the units is pleasing and compatible with the neighbourhood.

3.3 Concluding Remarks

Generally, the occupants and host families continue to be well pleased with the design, layout and exterior appearance of the units. The comments made for the interim assessment are similar to those made at the time of the initial assessment. The only significant comment made once again related to the layout of the unit. Specifically, the size of the living room and the entrance/dining area is considered a problem by the Lethbridge couple, one of whom uses a wheelchair. If couples and persons in wheelchairs are to remain eligible occupants of garden suites in future, these comments should be considered. Also, comments related to the "trailer like" appearance should be considered since it was noted frequently during both the initial and interim assessments.

4.0 Appropriateness of Siting Criteria

4.1 Initial Assessment

In both cases, the Lethbridge occupants and host families had initially reported being very pleased with the siting aspects of the units. All Lethbridge neighbours had indicated that the placement of the units did not in any way affect the use and enjoyment of their properties, nor were their views affected.

In Parkland, the occupants of the two units which were in place at the time of the initial assessment were very pleased with the siting of the units. One of the two host families agreed. The second family, however, had indicated that although they were basically satisfied with the unit siting, they would have preferred that it be located a little further from the host dwelling. In fact, the unit had been moved as much as was feasible and at additional servicing costs. In terms of use and enjoyment of their properties, Parkland neighbours provided similar responses to those of Lethbridge neighbours. An immediate neighbour in the semi-rural location had indicated that their view was marginally affected.

4.2 Interim Assessment

In Lethbridge, the host families and neighbours continue to be well pleased with siting aspects of the units. Use and enjoyment of yard amenity space was not affected, even during the summer months. One neighbour suggested that the placement of the unit makes the entire area more secure since most people work during the day and it is good to have "someone around to keep an eye on things".

However, in both cases, the occupants indicated that, after having lived in the units for about a year, they would have preferred that the units face the host dwelling more directly. In the one case, where the living room bay window faces the alley, the only option would have been to reverse the unit orientation so that the window faced the main house. This would have given a view of the house which is considered beneficial for security reasons. As it is presently sited, the occupants must step outside the unit to see the host dwelling. The occupants did concede that the problem would then arise that the house would be all that they would be able to see and this could be "boring". A better solution would be to add one more window in the bedroom. The occupants noted this in assessing the interior features of the unit.

In the second Lethbridge case, the occupant would have preferred that the front door face the host dwelling. She felt this "just made more sense". In fact, this orientation had been considered at the time of unit siting but was rejected because a natural gas line would have had to have been relocated. In both Lethbridge cases, the occupants reported no change in the use of the yard space as a result of the placement of the units. They have continued to use the yards as if they were their own.

In Parkland, one of the occupants and the corresponding host family is pleased with the siting aspects of the unit. The family had initially preferred that the unit, located in a rural setting, be more distant from the main house but this no longer appears to be a concern. A second occupant, who was initially pleased with the unit siting, now feels it should be closer to the main road so that he may better "see what's going on". The host family continues to be pleased with unit siting. In both these cases, the use of the yard space by the occupants and host families has not been affected by the placement of the garden suite.

Both the occupant and the host family of the third unit, which was not in place at the time of the initial assessment, stated that they still would have preferred the site they had first chosen to the actual site. Their first choice was closer to a large stand of trees running along the property line. This location would have afforded the occupant more privacy, some shade and would have broken up the yard less. As it now stands, the occupant and host family must share the front yard space and the unit is clearly visible from the roadway thereby detracting from the occupant's privacy. However, the occupant did concede that the current site is well located in relation to the host dwelling.

The current site was selected as a compromise during the tea party held prior to unit placement. The neighbours who share the property line and the stand of trees objected to the unit being placed so close to the trees and their property. They indicated that they may feel inhibited from undertaking certain activities on their property with the unit being so close. Specific activities include the use of a dirt bike trail which runs along the perimeter of the property and a picnic area located in the stand of trees. These activities can generate a good deal of noise and they did not want to feel that they may be disturbing the occupant of the garden suite. The garden suite would not have been, nor is it now, visible from their property being effectively screened by the tree stand. These neighbours, when surveyed as part of the interim assessment, are pleased with the siting of the unit which has not affected the use and enjoyment of their property.

All remaining Parkland neighbours expressed general satisfaction with the siting of the units and indicated that they were not in any way affected. The only exception remains the one neighbour who had indicated that their view was slightly affected, although, once again, this was not considered as a problem.

4.3 Concluding Remarks

In Lethbridge, the occupants, host families and neighbours continue to be pleased with the siting aspects of the units. In Parkland, one year later, the one occupant who was initially pleased with the unit siting now would prefer that it be located closer to the main road. Conversely, the one host family who initially felt the unit was sited too close to the host dwelling no longer feels this way. The one neighbour who expressed some concern with their view being affected continues to feel this is the case but is not unduly concerned. However, the siting of the third Parkland unit, which is in a compromise location, is still not to the liking of either the occupant nor the host family, although the neighbours are well pleased. Nevertheless, the results, although not totally satisfactory, are quite successful and support a process which offers all affected parties

an opportunity to consider siting issues and make meaningful input during the planning and approval process before a final decision is made.

5.0 Appropriateness of Unit Construction and Foundation Methods Used

5.1 Initial Assessment

The technical performance of the units' building envelope and mechanical systems were initially rated highly in both Lethbridge and Parkland, with some minor exceptions. Cold floors had been identified as a problem by two occupants, one in each of Lethbridge and Parkland. Also, in Parkland, poor noise insulation was cited by one occupant who was bothered by highway traffic noise and both Parkland occupants noted that the humidifiers were not functioning. The humidifiers were both repaired shortly following the assessment interviews and the cold floor problem in Lethbridge was investigated.

At the time of the initial assessment, it was premature to evaluate the performance and suitability of the foundation techniques.

5.2 Interim Assessment

5.2.1 Unit Construction

Occupants again were asked to rate the effectiveness of the units' insulation, ventilation systems and heating systems. In general, all occupants rated them as quite effective or a very effective. Some concerns with certain units, however, were identified. All occupants noted that the units were very hot during the summer months, some said almost unbearably so. The Lethbridge occupant who had initially reported the cold floor problem said the problem continues to persist in spite of the manufacturer having installed more insulation. Because she wears slippers at all times, she is not overly concerned. This occupant further noted that the unit appears drafty in extremely high winds but was not able to identify the source. Two of the Parkland occupants also complained of drafts emanating from the exterior doors which are not properly weatherstripped. One occupant noted that ice builds up between the storm and the front doors in cold weather. The second noted that electrical outlets also are a source of drafts. This same occupant further noted that the heating system is effective but does not distribute heat evenly throughout the unit. The manufacturer has not been successful in solving the problem in spite of repeated attempts. A problem with the furnace initially not working was reported and repaired immediately. The occupant of the third Parkland unit, which was not in place at the time of the initial assessment, appreciated the efficiency of the humidifier.

Most occupants felt the units were durable and only two construction related problems were noted. First, as was previously noted, one of the Lethbridge occupants indicated that the nails and seams beneath the linoleum in the kitchen were starting to clearly show through. Second, one of the Parkland occupants reported that because the dining room window was not properly caulked, water had leaked into the outside wall. The manufacturer repaired the window. However, mildew is now growing on the inside wall and had not been removed at the time of the interview.

5.2.2 Foundation Methods

No major foundation problems related to settling were reported except in the case of one of the Parkland units which shifted noticeably to one side. The problem has since been corrected by the manufacturer. Some "creaking" and gentle rocking during strong winds was reported by one of the Lethbridge occupants but was not considered a problem.

5.3 Concluding Remarks

Cold floors continue to be a problem for some occupants and all occupants complained of excessive heat build up during the summer months. Cold floors, like curtains, may be a matter of perception and/or a characteristic feature of manufactured housing units. The same may be true of heat build up but, nevertheless, both complaints should be investigated further since elderly persons are particularly sensitive to temperature variations.

The problem with excessive highway related noise, reported initially by one Parkland occupant, is no longer a concern. No foundation related problems were reported other than the shifting in Parkland which was dealt with promptly.

6.0 Appropriateness of Servicing Techniques Used

6.1 Initial Assessment

Occupants and host families were initially asked to rate the servicing process rather than the services themselves. In Lethbridge, the servicing process had been rated as satisfactory and no major problems were encountered. In Parkland, the ratings varied between satisfactory at one site to unsatisfactory at the second site. Once again, as was previously noted, the third Parkland unit had not been placed at the time of the initial assessment.

6.2 Interim Assessment

Four of the five garden suite units have experienced some servicing problems. These problems were cited by both the occupants and host families affected. The problems, most of which have been addressed, are as follows:

- The water pipes froze during the cold Christmas season this past year in one of the Lethbridge units and the occupant was forced to vacate her suite. The manufacturer felt the problem was as a result of very high winds chills and the orientation of the unit in relation to the direction of the wind. The problem was finally rectified after a fifth effort to properly insulate the pipes. The host family is concerned that the pipes may freeze again given the right climatic conditions and attribute the problem to the poor foundation and skirting techniques used. The host family approached the manufacturer directly with the problem and attempts to repair the pipes were made as soon as possible.
- The garden suite occupants of the second Lethbridge unit experienced a noxious odour problem when the sewage pump located beneath the unit stopped operating. Sewage did not back up into the unit itself but, rather, collected beneath the unit resulting in the unpleasant smell. As soon as the occupants became aware of what the problem may be, they notified the management agent and it was expeditiously dealt with.
- The Parkland occupant and host family who had rated the servicing process as unsatisfactory for the initial assessment continue to experience problems, not with the services per se, but with site restoration. Site restoration did not commence until this past fall and is still not complete. The entire process has been too uncoordinated and drawn out. These same problems were experienced at the time of unit placement and servicing hookup. It should be noted that the host family has repeatedly contacted the manufacturer with regard to any problems rather than the management agent and has received limited satisfaction.
- The final servicing related problem occurred as a result of the most recent Parkland garden suite installation. The problem did not occur in the unit itself but, rather, in the host dwelling where the basement was flooded as a result of the trenching which was undertaken to extend the services to the unit. According to the host family, because the trench was full of water when it was filled, leakage started to occur around the drain pipe in the basement. The situation was exacerbated by extremely heavy rains which occurred soon thereafter and the entire basement was flooded. A sump pump was installed at the Department's expense. Once again, although concerns were dealt with expeditiously, the host family approached the manufacturer directly rather than first approaching the management agent.

No other servicing problems were reported. As a point of information, both Lethbridge units have a separate telephone line. Only one of the Parkland units has a separate line. The occupants of the remaining two units felt that the hookup charge was too great to warrant a separate line and, instead, use an extension line from the host dwelling.

6.3 Concluding Remarks

Problems with, or related to, services were reported in four of the five cases. This is the only feature of the garden suite units which has resulted in serious difficulties for the occupants and host families. Some of the problems were as a result of the installation techniques and while others resulted from unit construction. Regardless, the degree of seriousness warrants further investigation of the techniques used and of remedial measures so that such problems can be avoided in future.

7.0 Appropriateness of the Garden Suite Concept

7.1 Initial Assessment

The initial assessment determined the garden suite concept to be an appropriate and viable seniors' housing option. This conclusion was based upon the initial attitudes and positions of key individuals and relevant groups associated with the pilot project or with seniors' accommodation. Key individuals included occupants, host families and neighbours. The variables measured for assessment purposes were demand, general satisfaction, overall attitude towards the garden suite and cost.

7.2 Interim Assessment

For the interim assessment, conclusions on the appropriateness of the garden suite as a concept are based exclusively on the attitudes and positions of occupants, host families and neighbours. The variables measured are general satisfaction with the units and the care and services provided, and overall attitudes towards the garden suite as a concept. All occupants, host families and neighbours expressed general satisfaction with the units. Also, occupants and host families are extremely satisfied with the care and services provided. Without exception, all individuals contacted during the interim assessment process responded with enthusiasm in support of the garden suite concept. More than half of the neighbours surveyed said they would consider the concept for their own parents or grandparents, given the "right situation".

7.3 Concluding Remarks

Based upon the approach used for the interim assessment, the garden suite concept continues to be a suitable and appropriate seniors' housing option. Interestingly, as was the case with the initial assessment, all the concerns raised by those surveyed related to the units, not the concept itself. The concept, as a lifestyle alternative, continues to provide a high degree of satisfaction and is regarded with enthusiastic support.

8.0 Conclusions

1. Value of Care and Services Provided

The interim assessment of the care and services provided reflects the initial assessment according to most variables measured. Relationships remain close and family members appear to be more willing and better able to share care and service responsibilities. In the one case where more assistance is now required for reasons of failing health, the garden suite arrangement was considered a particularly optimal option. In all cases, the quality of care and service afforded by the garden suite concept continues to be rated as excellent.

2. Appropriateness of Unit Design

Generally, the occupants and host families continue to be well pleased with the design, layout and exterior appearance of the units. The comments made for the interim assessment are similar to those made at the time of the initial assessment. The only significant comment made once again related to the layout of the unit. Specifically, the size of the living room and the entrance/dining area is considered a problem by the Lethbridge couple, one of whom uses a wheelchair. If couples and persons in wheelchairs are to remain eligible occupants of garden suites in future, these comments should be considered. Also, comments related to the "trailer like" appearance should be considered since it was noted frequently during both the initial and interim assessments.

3. Appropriateness of Siting Criteria

In Lethbridge, the occupants, host families and neighbours continue to be pleased with the siting aspects of the units. In Parkland, one year later, the one occupant who was initially pleased with the unit siting now would prefer that it be located closer to the main road. Conversely, the one host family who initially felt the unit was sited too close to the host dwelling no longer feels this way. The one neighbour who expressed some concern with their view being affected continues to feel this is the case but is not unduly concerned. However, the siting of the third Parkland unit, which is in a compromise location, is still not to the liking of either the occupant nor the host family, although the neighbours are well pleased. Nevertheless, the results, although not totally satisfactory, are quite successful and support a process which offers all affected parties an opportunity to consider siting issues and make meaningful input during the planning and approval process before a final decision is made.

4. Appropriateness of Unit Construction and Foundation Techniques Used

Cold floors continue to be a problem for some occupants and all occupants complained of excessive heat build up during the summer months. Cold floors, like curtains, may be a matter of perception and/or a characteristic feature of manufactured housing units. The same may be true of heat build up but, nevertheless, both complaints should be investigated further since elderly persons are particularly sensitive to temperature variations.

The problem with excessive highway related noise, reported initially by one Parkland occupant, is no longer a concern. No foundation related problems were reported other than the shifting in Parkland which was dealt with promptly.

5. Appropriateness of Servicing Techniques Used

Problems with, or related to, services were reported in four of the five cases. This is the only feature of the garden suite units which has resulted in serious difficulties for the occupants and host families. Some of the problems were as a result of the installation techniques and while others resulted from unit construction. Regardless, the degree of seriousness warrants further investigation of the techniques used and of remedial measures so that such problems can be avoided in future.

6. Appropriateness of the Garden Suite Concept

Based upon the approach used for the interim assessment, the garden suite concept continues to be a suitable and appropriate seniors' housing option. Interestingly, as was the case with the initial assessment, all the concerns raised by those surveyed related to the units, not the concept itself. The concept, as a lifestyle alternative, continues to provide a high degree of satisfaction and is regarded with enthusiastic support.

Appendix
Survey Instruments

Occupant Survey

Name: _____

_____

I. Current Status

1. Has the status of your health changed at all since we last met?

   ☐ Yes
   ☐ No

   If yes, in what way? _____

   _____

   _____

2. How would you rate your health at present?

   ☐ Good
   ☐ Satisfactory
   ☐ Poor
   ☐ Very Poor

3. Are you now receiving any home care services from government not received when we last met?

   ☐ Yes
   ☐ No

   If yes, what services/programs?

   _____

   _____

   _____

   What cost, if any? _____

   _____

   _____

   _____

   _____

   _____

   _____

II. Lifestyle/Care and Service

1. What do you like most about your present living arrangements?

   ☐ Privacy/security
   ☐ Independence
   ☐ Location (distance to shopping)
   ☐ Local Amenities (community facilities)
   ☐ Design/Layout/Special Features
   ☐ Friends/Social Contacts
   ☐ Proximity to Family

   Other, specify _____

   _____

   _____

2. What do you dislike the most about your present living arrangement?

   ☐ Lack of security
   ☐ Lack of independence
   ☐ Lack of privacy
   ☐ Distance to shopping areas
   ☐ Distance to other community/social facilities (eg. church, seniors drop-in)
   ☐ Poor design/layout/lack of special features
   ☐ Lack of friends and social contact
   ☐ Proximity to family

   Other, specify _____

   _____

   _____

3. How independent of your family do you feel in the garden suite?

   ☐ Very Independent
   ☐ Quite Independent
   ☐ Not Very Independent

4. Has your degree of independence changed since we last met?

- ☐ More
- ☐ Less

Why? _____

_____

_____

5. What support and care services does your family now provide?

- ☐ Regular Visits/Companionship
- ☐ Shopping/Errands
- ☐ Meals, Preparation and Delivery
- ☐ Attending Medical Appointments
- ☐ Nursing Assistance
- ☐ Household Chores
- ☐ Social and Other Needs
- ☐ Transportation
- ☐ Bathing and Other Personal Assistance

6. Has the degree of support increased since we last met?

- ☐ Yes
- ☐ No

If yes, in what way? _____

_____

_____

7. Which family member provides the most support?

_____

_____

_____

8. What services do you provide the family?

_____

_____

_____

9. Have you been able to maintain your social contacts?

- ☐ Yes
- ☐ No

If no, why not? _____

_____

_____

_____

10. Do you now use any local community facilities?

- ☐ Yes
- ☐ No

If yes, which ones? _____

_____

_____

If no, why not? _____

_____

_____

11. Do you feel a part of your neighbourhood?

- ☐ Yes
- ☐ No

If no, why not? _____

_____

_____

12. Has your overall quality of life improved since moving into the unit?

- ☐ Yes
- ☐ No

If yes, how has it improved? _____

_____

_____

13. Has your relationship with your family changed?

- ☐ Yes
- ☐ No

If yes, explain _____

_____

_____

_____

_____

14. How would you rate/compare your garden suite arrangement to your former living arrangement?

_____

_____

_____

_____

_____

_____

_____

15. What reasons would cause you to move?

- ☐ Ill Health
- ☐ Family Problems/Conflicts
- ☐ Neighbour Problems/Conflicts
- ☐ Dislike of Unit

Other, Specify _____

16. Since moving into your unit about one year ago, how do you feel overall about this living arrangement?

III. Unit Assessment

1. How well does your garden suite measure up to your initial expectations? _____

2. How do you generally feel about the following unit features?

Size _____

General Layout _____

Furnishability _____

Special Features _____

Privacy _____

Security _____

Independence _____

Use of Yard Space _____

3. Are you pleased with the following interior design features:

General Decor _____

Wall Finishes _____

Floor Finishes _____

Location of Entrance _____

Number of entrances _____

Location of Windows _____

Type of Windows _____

Number of Windows _____

Lighting _____

Strorage space _____

Other Features, specify _____

4. How convenient to use are your unit amenities?

Is your kitchen convenient to use? _____

Are your appliances easy to use? _____

Is your bathroom easy to use? _____

5. How effective is the insulation of your unit (drafts, comfort)?

- ☐ Not very
- ☐ Quite
- ☐ Very

6. How effective is the ventilation system (air flow)?

- ☐ Not very
- ☐ Quite
- ☐ Very

7. How effective is the heating system?

- ☐ Not very
- ☐ Quite
- ☐ Very

8. What safety features have been added to your unit, if any? (hand rails, grab bars, intercom) _____

9. What additional safety features would you like, if any? _____

10. How accessible is your unit (how easy is it to enter and move about your unit)?

- ☐ Not very
- ☐ Quite
- ☐ Very

11. How comfortable is your unit overall?

- ☐ Not at all comfortable
- ☐ Not very
- ☐ Somewhat
- ☐ Quite
- ☐ Very comfortable

12. What would you change, if anything?

13. How do you feel about the exterior appearance (aesthetics) of the unit?

14. Are you pleased with the exterior design features (exterior wall finishes, special features such as the porch)?

15. Is the location relative to the host dwelling to your liking?

- ☐ Yes
- ☐ No

If no, why not? _____

16. Is the location relative to your neighbours to your liking?

17. Is the walkway to your liking (if appropriate)?

- ☐ Yes
- ☐ No

If no, why not? _____

18. One year later, how would you generally rate your unit?

IV. Unit Construction

1. Have you had any problems with unit construction (eg. durability)?

☐ Yes
☐ No

If yes, what were they?

_____
_____
_____

2. Have you had any problems with unit shifting or with other foundation related problems?

☐ Yes
☐ No

If yes, please describe.

_____
_____
_____

V. Unit Services

1. Have you had any problems with water, sewer or electrical services?

☐ Yes
☐ No

If yes, please describe.

_____
_____
_____

VI. Management

1. Were your concerns/problems dealt with expeditiously?

_____
_____
_____

2. If not, please explain.

_____
_____
_____

Host Family Survey

Name: _____

_____

I. Current Status

1. Has the occupant's state of health changed since we last met?

☐ Yes
☐ No

If yes, in what way? _____

_____

_____

II. Lifestyle/Care and Service

1. Which of the following support services do you presently provide? Approximately how many hours a week for each?

___ Regular Visit/Companionship
___ Shopping Errands
___ Meals, Preparation and Delivery
___ Accompanying to Medical Appointments
___ Social and Other Transportation Needs
___ Household Chores
___ Bathing and Other Personal Assistance
___ Nursing Assistance

Other, specify _____

_____

_____

2. What support services do you provide now that you were not able to provide, or not able to provide as easily, under the former living arrangement?

_____

_____

_____

_____

3. Has there been a change in the level of care and service required since the occupant has moved into the unit?

☐ Yes
☐ No

If yes, explain _____

_____

4. What services does the occupant provide the family?

_____

_____

_____

How does this compare with your initial expectations? _____

_____

_____

5. Has there been a change in the role of the principal care giver?

☐ Yes
☐ No

If so, explain _____

_____

_____

6. How much cooperation is there in your family with the care and support provided the occupant?

☐ None
☐ Not Much
☐ Some
☐ Quite a Lot
☐ A Lot

7. How much conflict is there?

☐ A Lot
☐ Quite a Lot
☐ Some
☐ Not Much
☐ None

8. When you or your family are away, who provides the necessary services? _____

_____

_____

9. What, if any, disadvantages of the former living arrangements have been eliminated by the garden suite? _____

10. Has the current living arrangement eliminated stress you formerly experienced with such factors as:

- ☐ Concern over Health and Safety
- ☐ Concern over Security
- ☐ Time Spent on Care Due to Proximity
- ☐ Concern of Occupant's Future
- ☐ Concern over Adequate General Care
- ☐ Concern over Social Contact

Others, specify

11. Has the quality of your family lifestyle been affected by the garden suite arrangement?

- ☐ Yes
- ☐ No
- ☐ If yes, explain _____

12. Has your relationship with the occupant changed since we last met?

- ☐ Yes
- ☐ No

If yes, explain _____

13. Overall, how pleased are you with the current living arrangements?

- ☐ Not at all pleased
- ☐ Not very
- ☐ Somewhat
- ☐ Quite
- ☐ Very pleased

14. What aspects of the current living arrangements pleases you most? _____

What aspects concern you the most? _____

15. How does the arrangement measure up to your initial expectations? _____

Explain. _____

16. For what reasons would the occupant move out?

- ☐ Ill Health
- ☐ Family Problems/Conflicts
- ☐ Neighbour Problems/Conflicts
- ☐ Dislike of Unit

Other, specify _____

17. Since placement of the unit about one year ago, how do you generally feel about this living arrangement?

III. Unit Assessment

1. Overall, how pleased are you with the appearance/aesthetics of the unit?

- ☐ Not at all pleased
- ☐ Not very
- ☐ Somewhat
- ☐ Quite
- ☐ Very pleased

2. What suggestions can you offer for improving the unit appearance? _____

3. Overall, how pleased are you with the design and general layout of the unit?

- ☐ Not at all pleased
- ☐ Not very
- ☐ Somewhat
- ☐ Quite
- ☐ Very pleased

4. What suggestions can you offer for improving the unit? _____

5. What aspects of the unit please you most (aesthetics, design, cost)? _____

6. Do you feel the rent is reasonable

- ☐ Yes
- ☐ No

If no, what would be reasonable? _____

7. One year later, how do you generally feel about the unit? _____

IV. Siting, Servicing, Management, Neighbourhood Impact

1. Now that the unit has been in place for about a year, how do you feel about the way it is sited (relationship to host dwelling, setbacks, orientation)? _____

What would you change, if anything? _____

2. Has your yard amenity space been affected? Or the use and enjoyment of your property?

- ☐ Yes
- ☐ No

If yes, explain _____

3. Are you experiencing any parking problems?

- ☐ Yes
- ☐ No

If yes, explain _____

4. Have you experienced any problems with the services (ie. water, sewer, electrical)?

- ☐ Yes
- ☐ No

If yes, explain? _____

5. Have you experienced any other problems?

- ☐ Yes
- ☐ No

If yes, explain _____

6. Have any concerns been expeditiously handled?

- ☐ Yes
- ☐ No

If no, explain _____

7. Have your neighbours responded in any way to the unit?

- ☐ Yes
- ☐ No

If yes, in what way? _____

8. Has your relationship with your neighbours changed since since we last met?

☐ Yes
☐ No

_____
_____

9. If there has been a negative change, what could have been done to prevent that from happening?

_____
_____
_____

Neighbour Survey

Name: _____

_____

1. Has the garden suite unit affected the use and enjoyment of your property?

   ☐ Yes
   ☐ No
   If yes, in what way? _____

   _____

   _____

2. Has your view been affected?

   ☐ Yes
   ☐ No
   If yes, in what way? _____

   _____

   _____

3. Would the enjoyment of your property and/or impact on your view be improved if the unit were sited differently on the host family's property?

   ☐ Yes
   ☐ No
   If yes, what siting changes? _____

   _____

   _____

4. How would you rate the appearance/aesthetics of the unit?

   ☐ Poor
   ☐ Fair
   ☐ Good
   ☐ Excellent
   What would you like to see changed, if anything? _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

5. Do you feel the unit's appearance and design are compatible with the neighbourhood? Does it fit in well?

   ☐ Yes
   ☐ No
   If no, explain _____

   _____

   _____

6. Would you be concerned if there were more of these units in your neighbourhood?

   ☐ Yes
   ☐ No
   If no, explain _____

   _____

   _____

7. How many is enough? _____

   _____

   _____

8. Has your relationship with your neighbour changed since the unit has been placed?

   ☐ Yes
   ☐ No

9. If the change is a negative one, what could have been done to prevent it? _____

   _____

   _____

   _____

   _____

10. Has your initial opinion of the garden suite concept changed now that the unit has been in place for about a year?

☐ Yes

☐ No

If yes, explain why? _____

_____

_____

11. Would you ever consider the concept for your own parents or grandparents?

☐ Yes

☐ No

If no, why not? _____

_____

_____